

Windward, O'ahu Tourism Assessment

How much is too much?



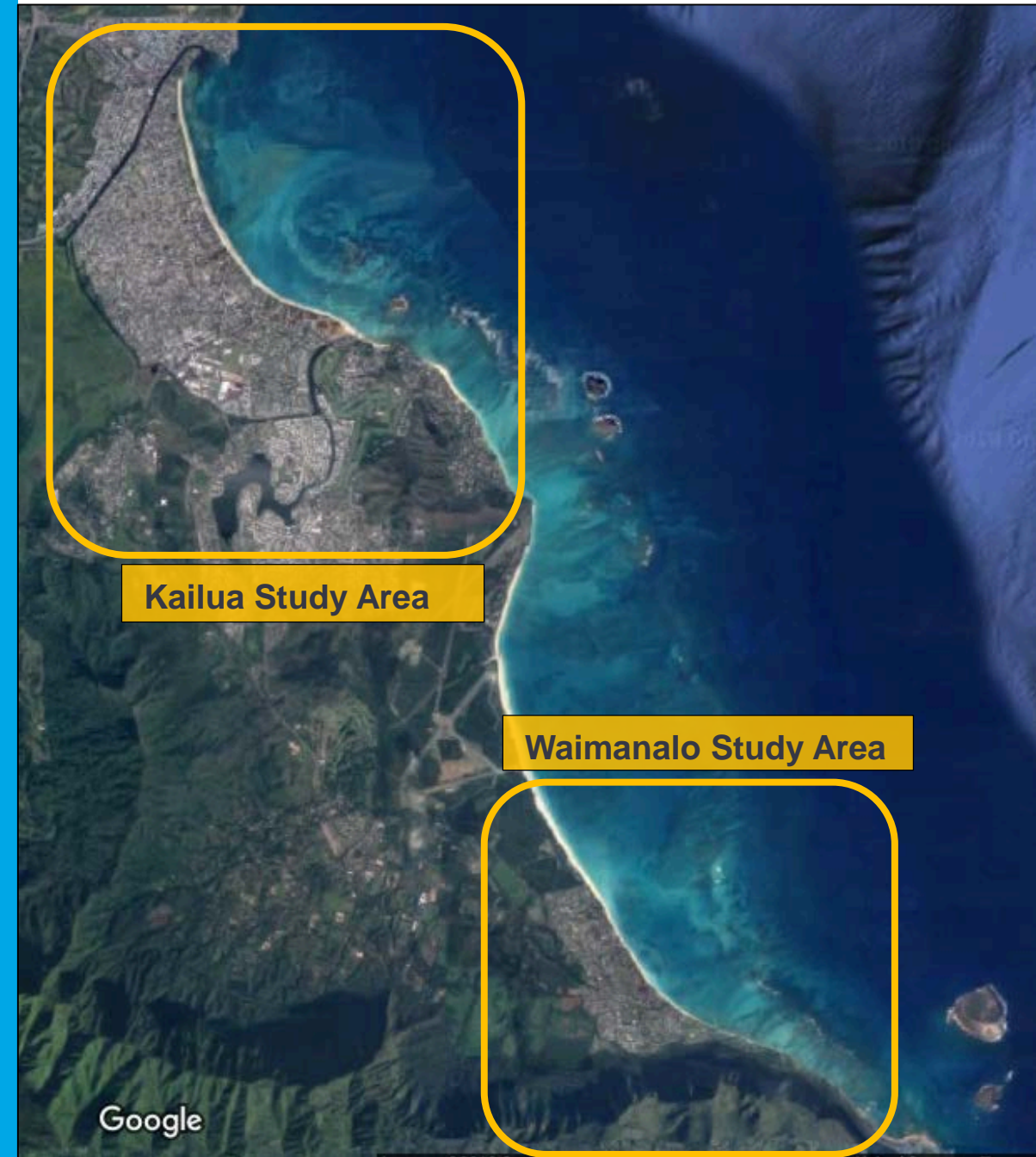
Dolan Eversole, University of Hawai'i Sea Grant Program



Windward O'ahu, Hawaii

Project Areas:

Kailua, Lanikai and Waimanalo
O'ahu, Hawaii

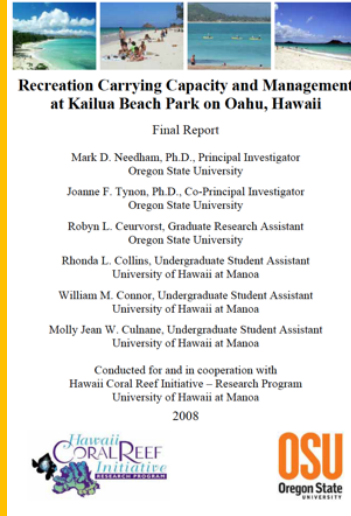




PROJECT SCOPE

- **Assess social, economic and resource impacts.**
- **Provide outreach and education for communities.**
- **Evaluate community perception of tourism.**
- **Evaluate and prioritize options to address issues.**
- **Develop transferable methodology.**
- **Design a comprehensive implementation strategy.**

Project Components



✓ Stakeholder Interviews

Over a dozen community stakeholder interviews conducted prior to the development of the survey.

✓ Beach park Carrying Capacity Study



452 responses generated from field surveys over 3 weeks in July and August, 2019. 87% response rate. 95% confidence level +/- 4.16%

✓ Resident Perception

Surveys delivered in July to October, 2019. 4,700 representative residents.

✓ N=619 Kailua n= 225 Waimanalo

Community Outreach

Planned community outreach of December, 2019.

✓ Visitor Intercept Surveys



Intercept surveys conducted in July, 2019.

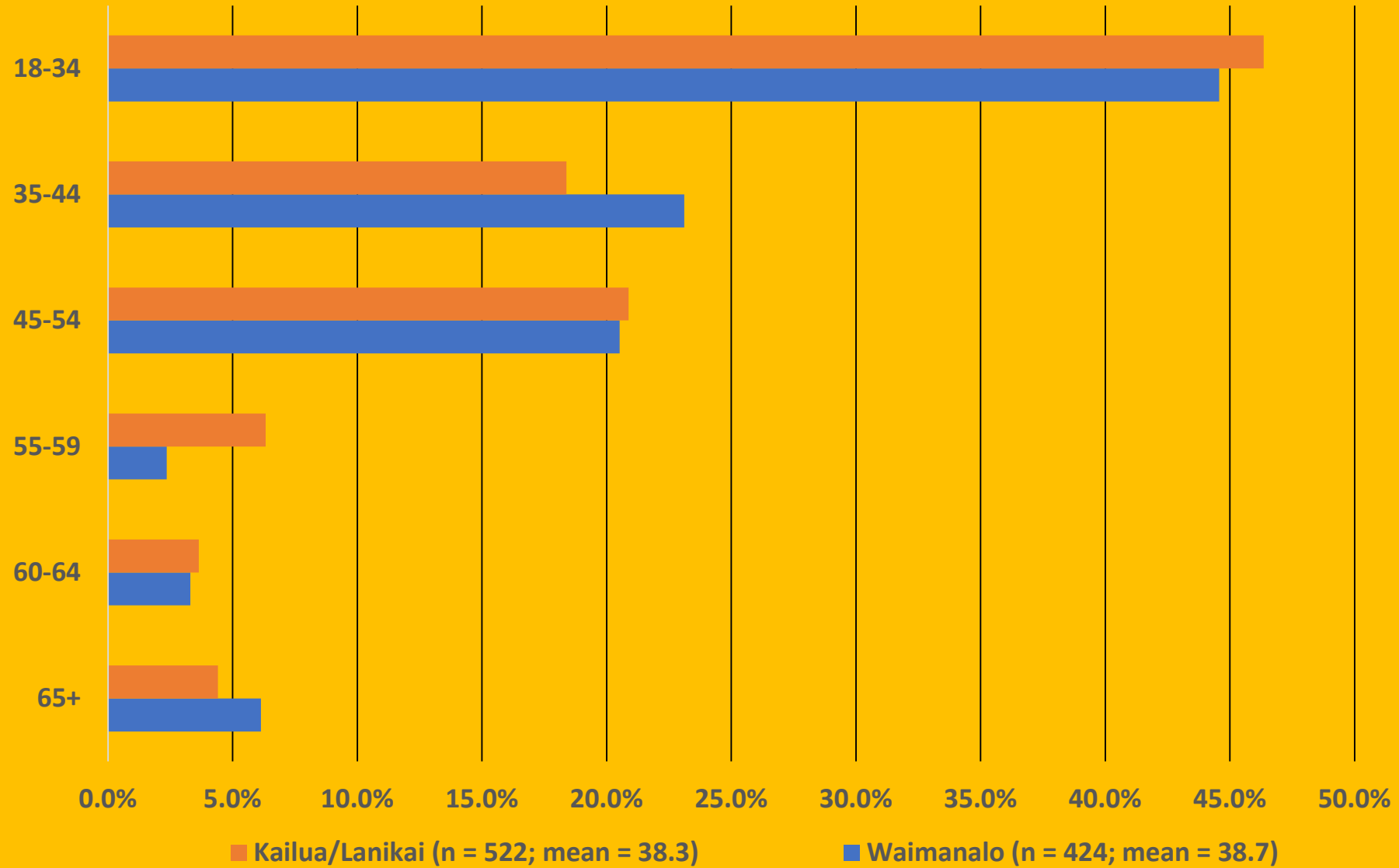
n= 506 Kailua, n= 377 Waimanalo

Final Report

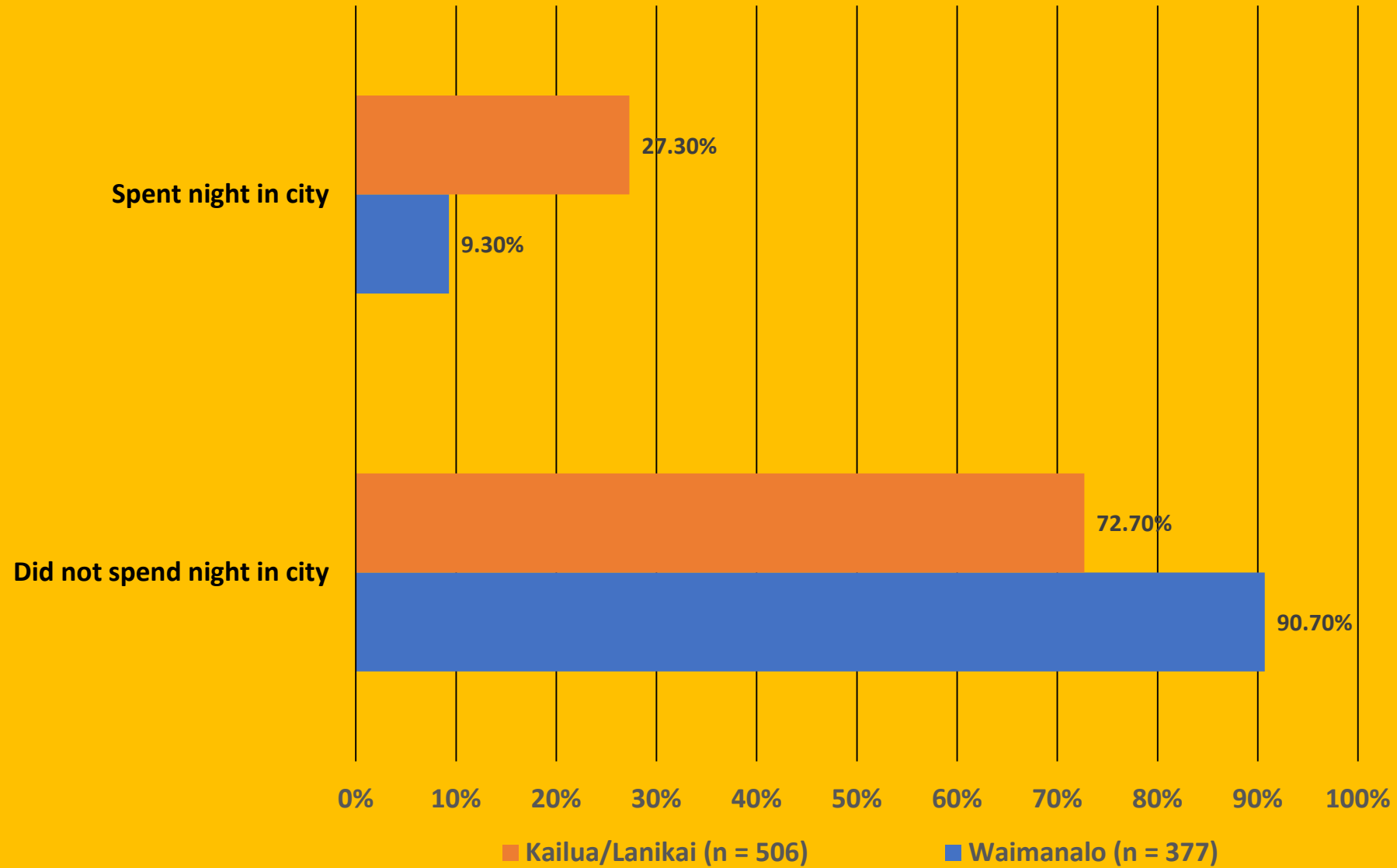


Due June, 2020 with survey summary and recommendations for improving visitor management "hot spots."

Age Distributions of Visitors to Kailua/Lanikai Versus Waimanalo, Hawaii, July/August 2019



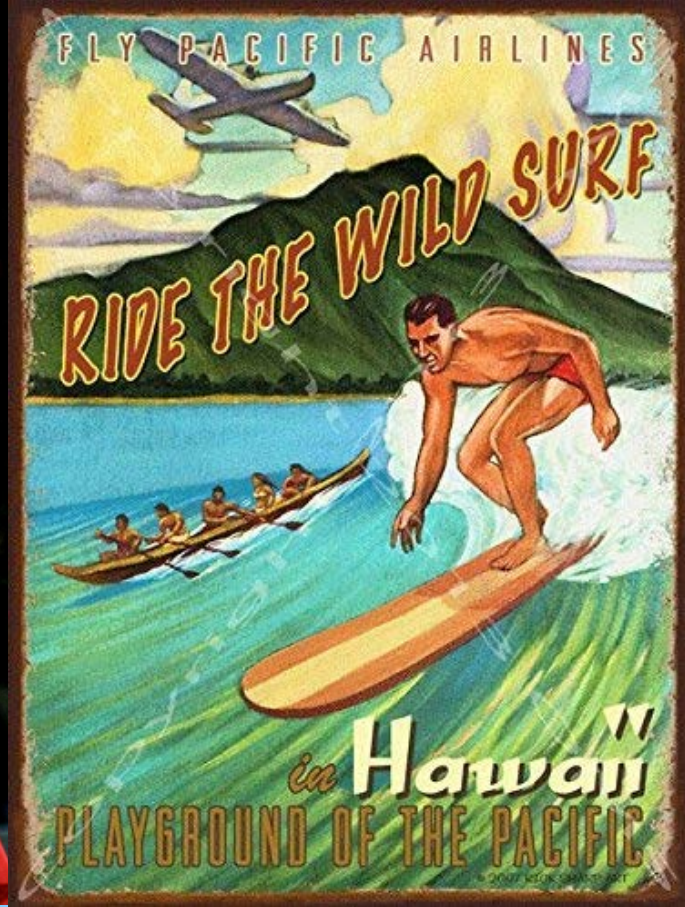
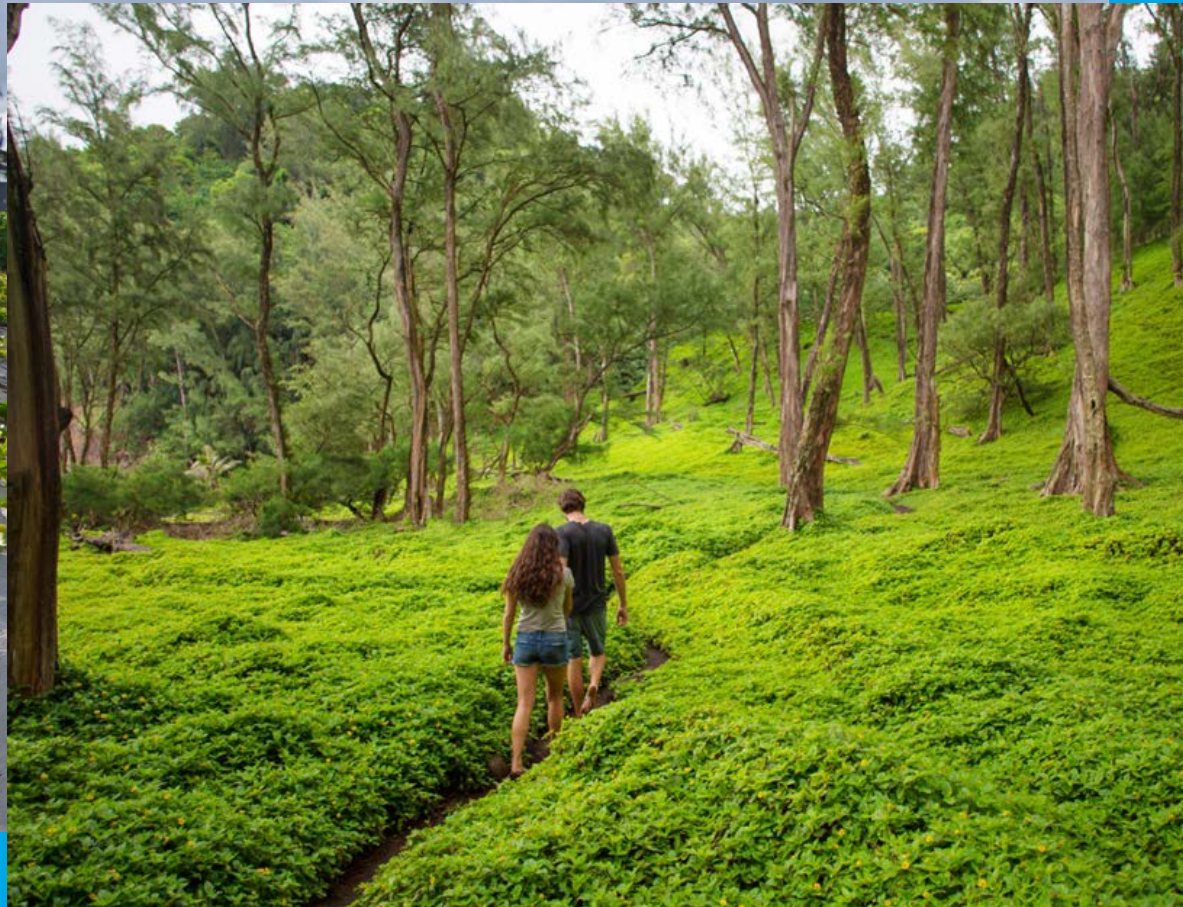
Day Versus Overnight Visitation to Kailua/Lanikai Versus Waimanalo, Hawaii, July/August 2019



A long history of tourism in Hawaii

Hospitality is in the Hawaiian culture and history (*Ho'okipa*)

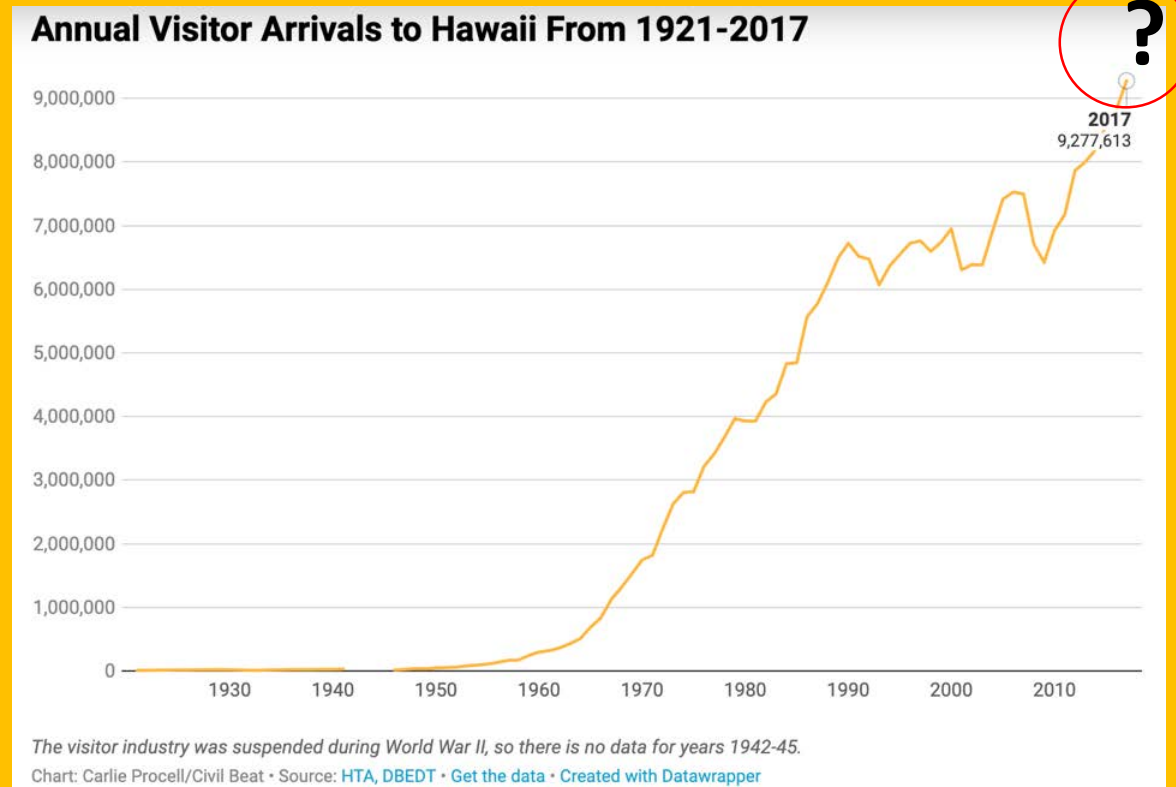




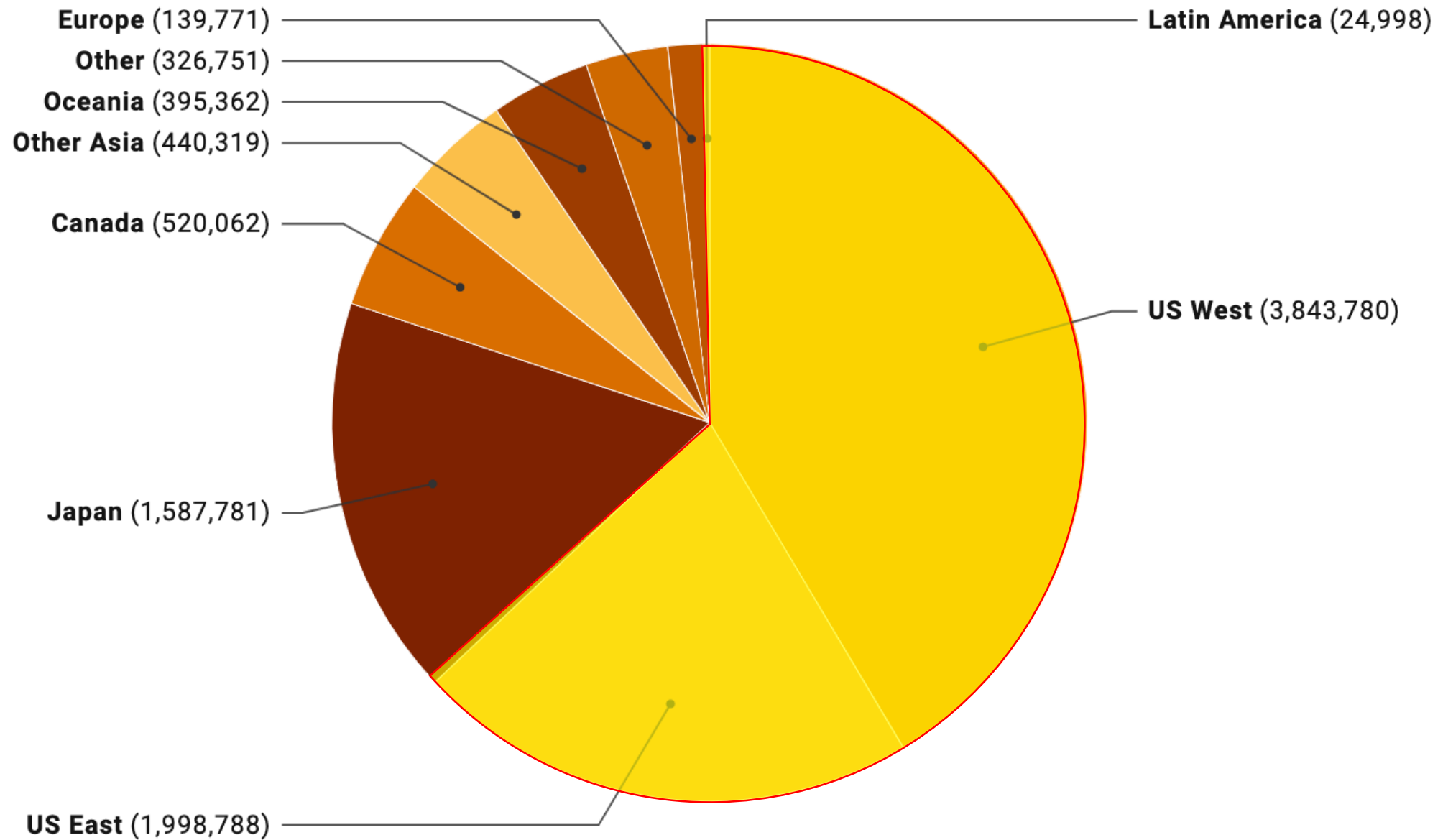
10,000,000

2020 estimated annual visitor arrivals.

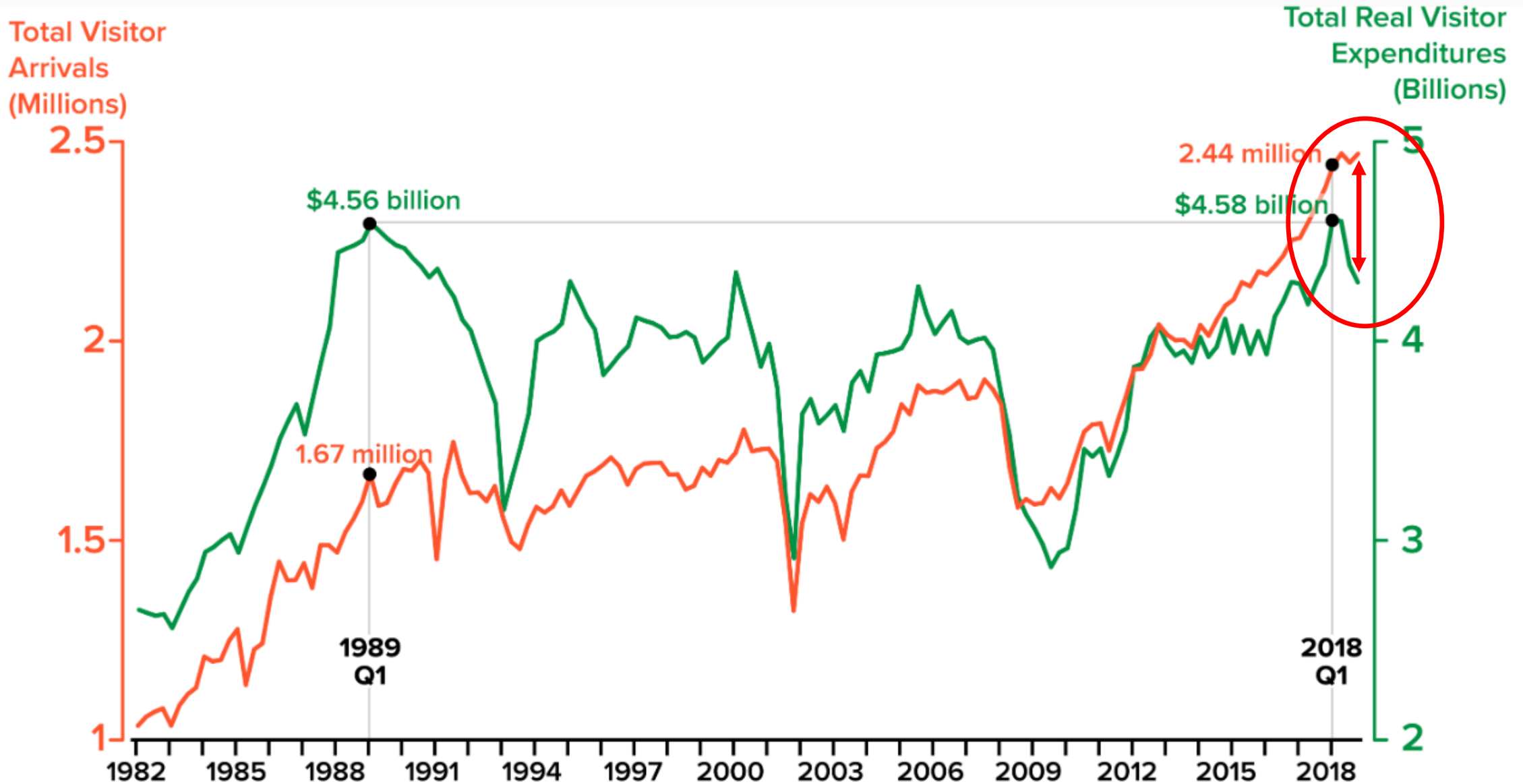
Hawai'i Visitor Authority



Where Visitors Come From



More Tourists, Same Revenue



Numbers in chart are quarterly totals.

Is The Public Turning Against Tourism?

“Tourism has brought more benefits than problems”

2009

78%

of respondents somewhat or strongly agreed

2018

59%

“This island is being run for tourists at the expense of local people”

2009

49%

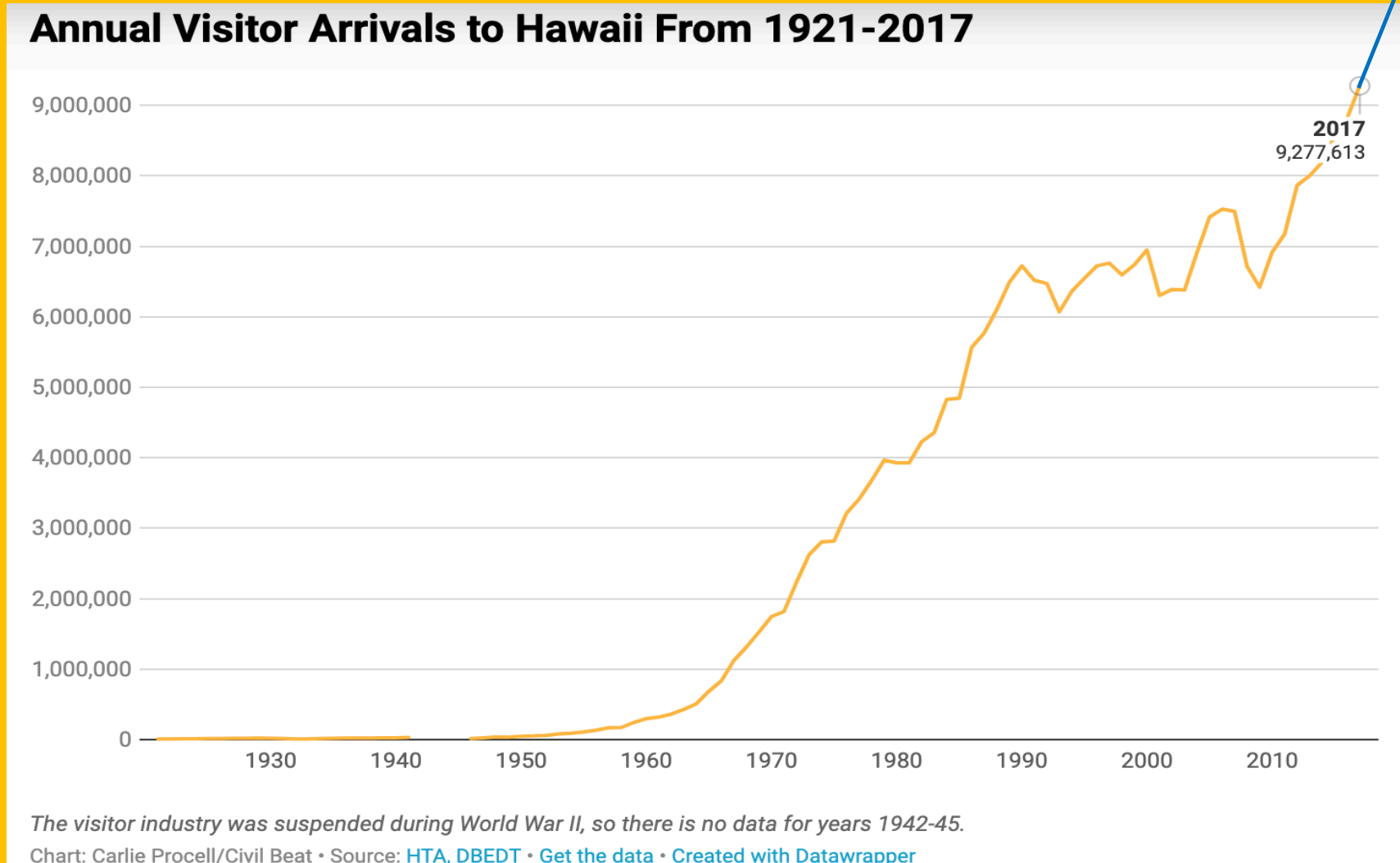
of respondents somewhat or strongly agreed

2018

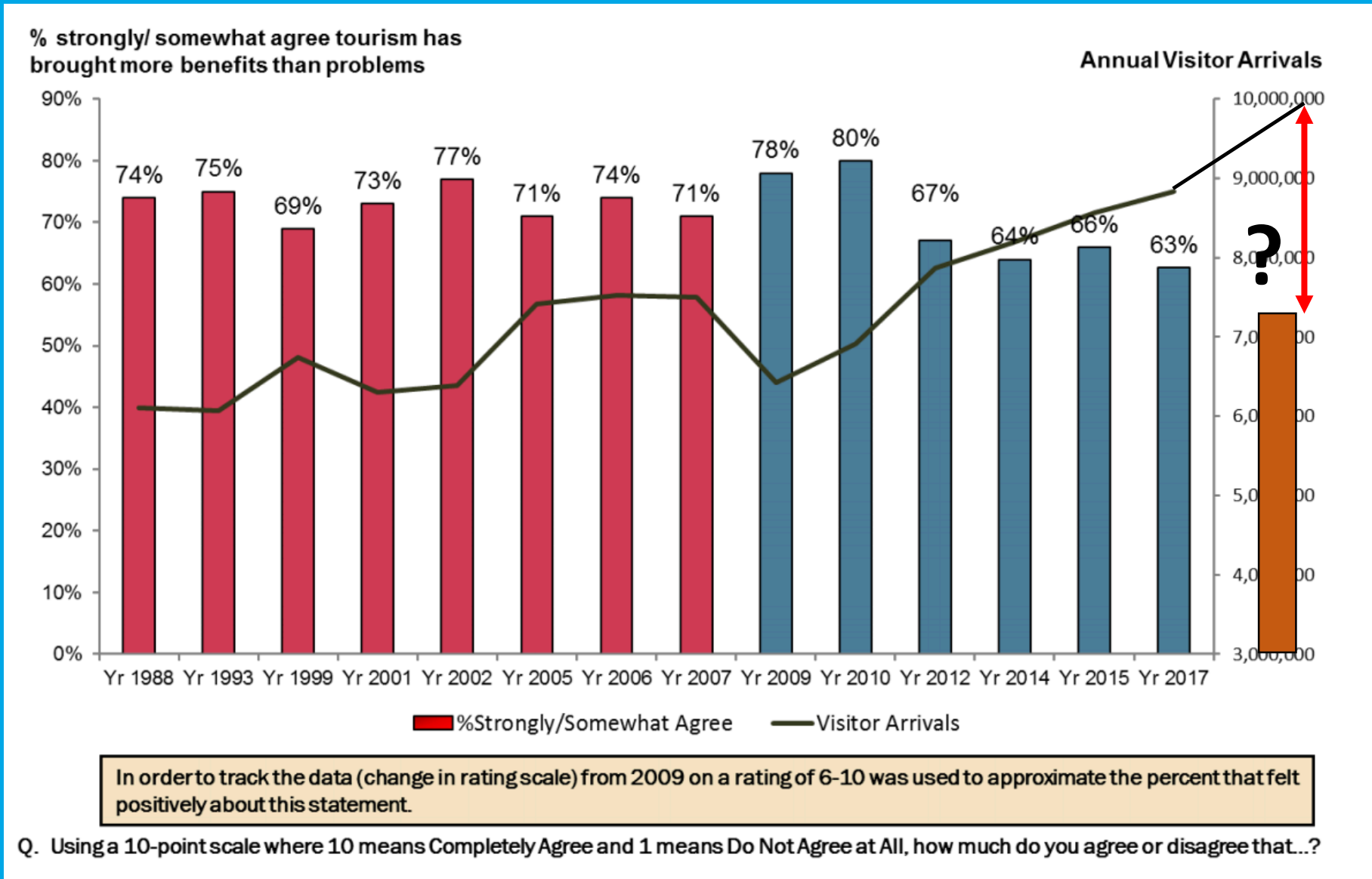
66%

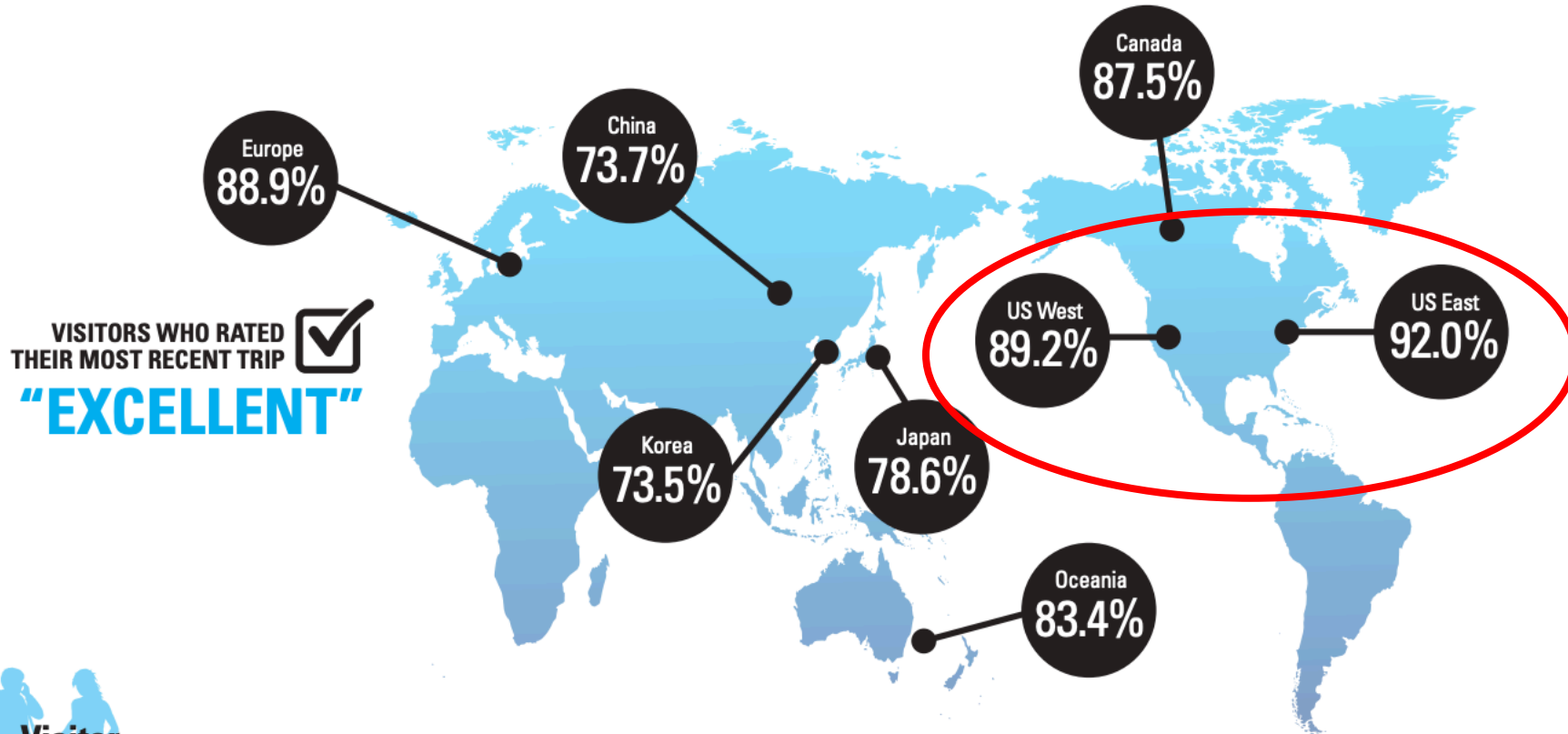
What if we compare resident satisfaction

itors,
10 Million?



Hawai'i Tourism Authority Resident Satisfaction Survey (2017)





Visitor Profile by MMA

| | US West | US East | Japan | Canada | Europe | Oceania | China | Korea |
|----------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|------------------|---------------------|---------------------|
| Average Age | 52 | 52 | 40 | 52 | 48 | 51 | 36 | 35 |
| Affluent Households | 24% \$200K+ | 27% \$200K+ | 12% ¥15M+ | 21% \$200K+ | 13% \$200K+ | 16% \$200K+ | 9% ¥1,253,600+ | 24% ₩92,391K+ |
| Education | 35% College Grad | 36% College Grad | 54% College Grad | 33% College Grad | 31% College Grad | 32% Post Grad | 53% College Grad | 58% College Grad |



“

“I don’t think tourism is being managed at the expense of residents in Kailua,...in fact, I don’t think tourism is being managed at all.”

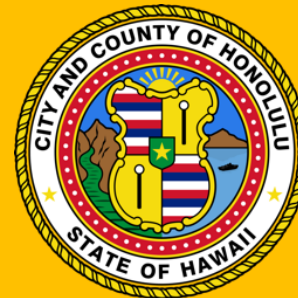
Laura Thielen, Hawai'i State Senator (Senate District #25) August, 2019

WHO Should manage Tourism in Hawai'i?



State and local Government?

- Hawai'i Tourism Authority
- State Department of Business, Economic development and Tourism
- Department of Land and Natural Resources
- Hawai'i Coastal Zone Management Program
- City and County of Honolulu
- New state office?
- New Local office?
- University role?

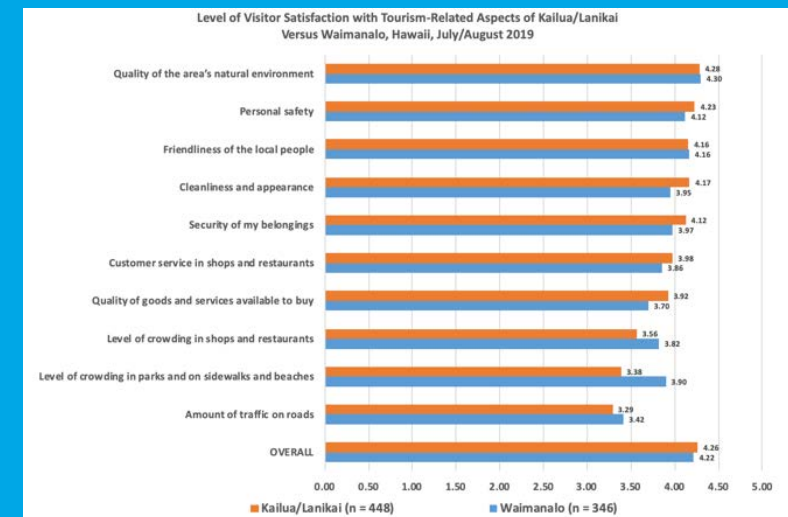


Then HOW do we manage Tourism in Hawai'i?

Is it even possible to effectively manage
tourism in Hawaii?

Windward Resident Visitor Satisfaction Surveys *Top Scored Values.*

1. Quality of the Natural Environment (4.28)
2. Personal Safety (4.23)
3. Friendliness of locals. (4.23)
4. Cleanliness and appearance. (4.17)
5. Security of Belongings.



Note: Scale ranged from 1 ("Extremely Dissatisfied") to 5 ("Extremely Satisfied")

Windward Resident Visitor Satisfaction Surveys *Lowest Scored Values.*

1. Traffic on roads (3.29)
2. Traffic in parks and beaches (3.38)
3. Traffic in shops (3.56)



Recommendations

1. Traffic management and transportation plan
2. Stakeholder advisory committee to develop strategies
3. Social media information management
4. Resource use fees and ranger enforcement
5. Improved education of visitors

Kailua Beach Management Plan

- Land Use Development Plan
- Identify Threats
- Assess Options
- Develop Planning Strategy and *Implementation Plan*

Kailua Beach and Dune Management Plan



December 2010

MAHALO!

Any questions?

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Waikīkī Beach Management Plan

May 30, 2018



Waikīkī Beach Special Improvement District Association

in Partnership with the
University of Hawai'i Sea Grant College Program



Comprehensive “vision” for Waikīkī Beach under future scenarios and priorities.

- Stakeholder-driven management and improvements plan.
- Potential cost vs benefit economic assessment of various alternatives.
- Community/stakeholder and visitor surveys of beach experience.



Waikīkī Beach Special Improvement District Association (WBSIDA)



Edmund Garmon, Flickr

- 1. Visitor intercept surveys on the beach.
- 2. Project is part of the Waikīkī Beach Management Plan.
- 3. Goal is to assess visitor perceptions of beach quality and value associated with infrastructure and environmental quality.





University of Hawai'i Sea Grant College Program

Economic Impact Analysis of the Potential Erosion of Waikiki Beach

A 2016 Update

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Final Draft
April 6, 2018